



INTERNATIONAL EGG AND POULTRY REVIEW

ISSN 1522-5100



U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

Guatemala

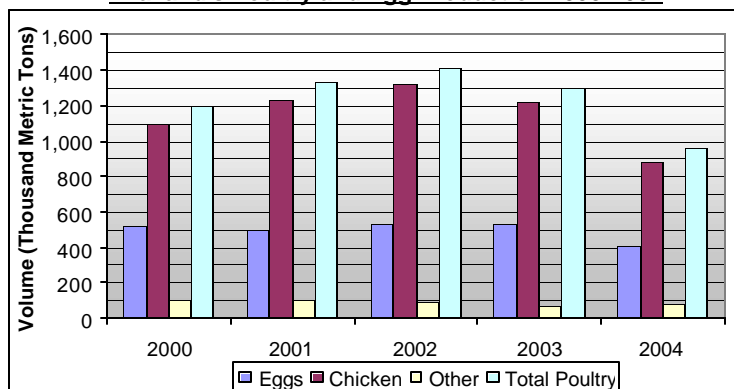
Prior to 2001, Guatemala had a quota of 7,000 metric tons (MT) and a tariff of 15%. Since then U.S. poultry exports have seen an increase of 12% each year, reaching its highest value in 2004 at \$41.7 million, as a result of the tariff reduction on poultry imports (2001) and the previous populist government expanding the tariff rate quota (TRQ) to 39,452 MT with a 5% tariff forcing wealthy poultry owners to lower prices.

Guatemala's TRQ has been lowered to 21,800 MT with a 15% tariff and a 164.4% consolidated tariff out of quota under CAFTA, which takes effect January 2006. U.S. exports provided almost 30% of the local consumption, due to the highly competitive, less expensive leg quarter, even though Guatemala has the productive capacity to cover all domestic demand. Both poultry and egg production are managed by local investment with 78% of broiler plants being technically advanced.

Small producers account for 22% of poultry production. Poultry meat production is expected to be 181.44 thousand MT (TMT) in 2006. Presently, 93% and 75% of Guatemala's chicken and turkey meat are imported from the U.S. respectively, competing with Nicaragua and Panama. Yet, U.S. exports in 2006 are forecast to drop 50% from 2005 (43,540 MT to be completed by December 2005.)

Egg production is estimated at 275 eggs/year/hen. All 350 egg producers make up a total of 7.0 million layers and 4.0 millions hens raised for laying purposes. An increase of 3% is projected for 2006, due to population growth and consumption. Source: USDA FAS

Thailand's Poultry and Egg Production 2000-2004



Source: FAO

Thai Poultry Meat Exports (Metric Tons)

| | Jan-Dec | | | | Jan-Jul | |
|---------------------------|------------------|------------------|------------------|-----------------|-----------------|----------------|
| | 2001 | 2002 | 2003 | 2004 | 2004 | 2005 |
| Chicken | 309,542.9 | 330,331.2 | 370,396.6 | 26,547.9 | 25,709.7 | 1,246.3 |
| Turkey | 178.0 | 27.1 | 55.0 | 2.3 | 0.7 | 21.9 |
| Other | 1.7 | 2,826.1 | 22,418.4 | 19,959.0 | 1,233.4 | 274.0 |
| Total Poultry Meat | 309,722.5 | 333,184.3 | 392,870.0 | 46,509.2 | 26,943.8 | 1,542.1 |

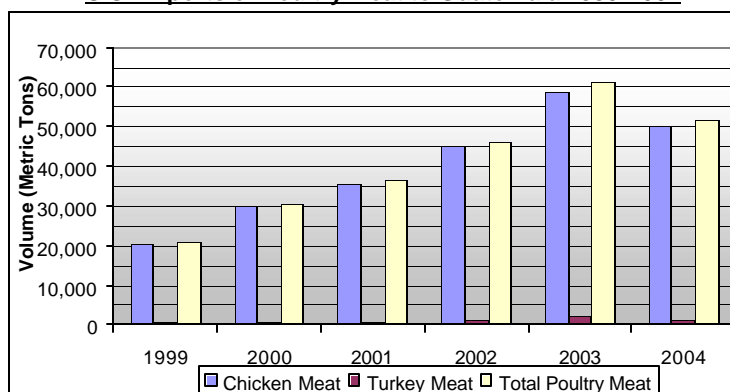
Source: Thailand Customs Department

Poultry and Egg Production in Guatemala (in Metric Tons)

| | 2000 | 2001 | 2002 | 2003 | 2004 |
|--------------------|---------|---------|---------|---------|---------|
| Hen Eggs | 81,000 | 82,500 | 85,000 | 85,000 | 85,000 |
| Chicken Meat | 140,069 | 144,000 | 155,000 | 155,000 | 155,000 |
| Total Poultry Meat | 140,069 | 144,000 | 155,000 | 155,000 | 155,000 |

Source: FAO

U.S. Exports of Poultry Meat to Guatemala 1999-2004



Source: USDA FAS

US Egg Exports to Guatemala (in Dozens)

| | Jan-Dec | | | | | Jan-Jul | |
|------------|---------|--------|------|------|--------|---------|---------|
| | 2000 | 2001 | 2002 | 2003 | 2004 | 2004 | 2005 |
| Table Eggs | 41,837 | 66,299 | 490 | 0 | 44,247 | 0 | 295,308 |

Source: USDA FAS

Thailand

Thailand is still in a state of recovery after Highly Pathogenic Avian Influenza (HPAI) first hit the poultry industry in November of 2003 and ravaging the country throughout 2004. Incidents of HPAI in 2005 have declined with the last cumulative figures for outbreaks from July 1 to August 29, 2005 totalling only 8 flocks in Suphanburi province, compared to 83 flocks in 11 provinces from February 1 to May 3, 2005. However, the affected populations have been mostly native chickens, ducks, and layering quails and chickens this past year.

Despite problems with acquiring breeding broiler stock from foreign suppliers, due to shortages in supply and new government regulations, production is forecast to grow modestly in 2005, while domestic consumption and exports are expected to recover quickly. Broiler meat production in 2006 is forecast to expand by 15 to 20% over the 2005 level, due to continued growth in domestic consumption and exports, as well as anticipated reductions in HPAI incidents.

It is estimated domestic consumption will grow as much as 7% in 2006. In the mean time, 2006 exports are projected to increase 20 to 30%, as a result of integrated Thai broiler producers expanding their cooked product supplies to meet increasing foreign demand. Back in May of 2005, chicken exports were projected to reach 300,000 metric tons (MT) in 2005. High domestic prices and improved export prices for cooked broiler meat are being enjoyed by all integrated poultry producers. Thailand exported to 31 countries in 2004 and has only exported to 23 countries so far this year.

Source: USDA FAS/Thai Customs/FAO/Various News Wires

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S./Canadian Live Poultry Slaughtered Under Inspection**

W/E 17-Sep-05 (PRELIMINARY)

U.S. Exports to Canada, in Pounds (000) (Preliminary)

| Week Ending September 17, 2005 | | Year-To-Date | | |
|--------------------------------|------|--------------|---------|--------|
| TYPE | 2005 | 2004 1/ | 2005 2/ | 2004 |
| Liquid | 363 | 608 | 12,509 | 12,018 |
| Frozen | 0 | 0 | 113 | 11 |
| Dried | 1 | 0 | 490 | 493 |
| Total | 364 | 608 | 13,112 | 12,522 |

U.S. Imports From Canada, in Pounds (000) (Preliminary)

| Week Ending September 17, 2005 | | Year-To-Date | | |
|--------------------------------|------|--------------|---------|-------|
| TYPE | 2005 | 2004 1/ | 2005 2/ | 2004 |
| Liquid | 182 | 100 | 5,030 | 6,693 |
| Frozen | 0 | 3 | 705 | 1,323 |
| Dried | 0 | 0 | 371 | 1,813 |
| Total | 182 | 103 | 6,106 | 9,829 |

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

| Week Ending September 17, 2005 | | Year-To-Date | | |
|--------------------------------|--------|--------------|---------|---------|
| TYPE | 2005 | 2004 1/ | 2005 2/ | 2004 |
| Jumbo | 17 | 60 | 162 | 378 |
| Extra Large | 5,340 | 5,250 | 160,995 | 135,786 |
| Large | 6,856 | 8,545 | 249,508 | 284,182 |
| Medium | 1,800 | 4,350 | 79,882 | 96,451 |
| Ungraded | 25,590 | 11,046 | 110,044 | 228,990 |
| Misc | 0 | 0 | 8,053 | 16,790 |
| Total | 39,603 | 29,251 | 608,644 | 762,577 |

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

U.S. Fowl Slaughtered Domestically

| | Light Hens | Heavy Hens | Total Hens |
|---------------------|------------|------------|------------|
| -----Thousands----- | | | |
| Head | 1,331 | 1,551 | 2,882 |
| Last Week | 1,035 | 1,042 | 2,077 |
| Same week yr ago | 1,443 | 1,561 | 3,004 |
| To-date/2005 | 54,793 | 52,488 | 107,281 |
| To-date/2004 | 50,365 | 49,601 | 99,966 |

U.S. Fowl Slaughtered in Canada

| | Light Hens | Heavy Hens | Total Hens |
|---------------------|------------|------------|------------|
| -----Thousands----- | | | |
| Head | 214 | 0 | 214 |
| Last Week | 326 | 0 | 326 |
| Same week yr ago | 333 | 0 | 333 |
| To-date/2005 | 9,755 | 40 | 9,795 |
| To-date/2004 | 8,938 | 90 | 9,028 |

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Total U.S. Fowl slaughtered in the U.S. and Canada

| | Light Hens | Heavy Hens | Total Hens |
|---------------------|------------|------------|------------|
| -----Thousands----- | | | |
| Head | 1,545 | 1,551 | 3,096 |
| Last Week | 1,361 | 1,042 | 2,403 |
| Same week yr ago | 1,776 | 1,561 | 3,337 |
| To-date/2005 | 64,548 | 52,528 | 117,076 |
| To-date/2004 | 59,303 | 49,691 | 108,994 |

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Sep 23, 2005

CHICKEN WITH SKIN ADDED

| FAT CONTENT | --- PRICES --- | | ---- VOLUME ---- | |
|-------------|----------------|-------------|------------------|---------|
| | FROZEN | FRESH | TOTAL | EXPORT |
| 15% OR LESS | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |
| 15-20% | | | | |
| RANGE | 18.00-25.00 | 12.00-23.00 | 1,456,800 | 481,600 |
| WTD AVERAGE | 21.00 | 18.19 | | |
| 20% OR MORE | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Sep 23, 2005

CHICKEN WITH SKIN ADDED

| FAT CONTENT | --- PRICES --- | | ---- VOLUME ---- | |
|-------------|----------------|-------------|------------------|---------|
| | FROZEN | FRESH | TOTAL | EXPORT |
| 15% OR LESS | | | | |
| RANGE | 20.50 | 18.00-21.00 | 396,000 | 156,000 |
| WTD AVERAGE | 20.50 | 20.50 | | |
| 15-20% | | | | |
| RANGE | 16.00-21.00 | 16.50-21.00 | 1,676,000 | 676,000 |
| WTD AVERAGE | 19.23 | 18.38 | | |
| 20% OR MORE | | | | |
| RANGE | - | 14.00 | 120,000 | - |
| WTD AVERAGE | | 14.00 | | |

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 23 SEPTEMBER 2005.

The market tone on white meat continued steady to firm. Demand light to good, best on tom breast meat, destrapped tenderloins and breast trim. Some buyer resistance starting to be noted on the higher trending breast meat prices while other buyers ponder the need to raise finished product prices. Offerings short to light and held with confidence. The market tone on tom drums steady to instances weak, tom 2-joint wings steady, balance steady to firm. Demand on tom drums light to moderate, balance moderate to good. Offerings of tom drums mixed, mostly adequate to ample; tom 2-joint wings adequate; balance light and spotty. Trading slow to moderate. For domestic: mixed breeder wings 35 shipping point, frozen -20% mechanically separated turkey -160 days age 18, livers 23 (pet foods), tails 27, yearling hen drums 39, frozen wing meat with skin (February, 2005 production) 66, fresh scapula 117-119, Grade A basted 8-10 lb. breasts 125, plant grade non-basted 14-16 lb. breasts 165, fresh breast trim 175.50, frozen breeder breast meat 213 cents delivered. For export: tom necks 36, fresh tom drums 46, fresh thigh meat 92 cents delivered.

| EXPORT TRADING | PRICE | L.S.T. | WTD AVG | VOLUME | WEEKLY | WEEKLY |
|--|--------------|----------------|----------------|---------------|---------------|---------------|
| FRIDAY, SEPTEMBER 23, 2005 | RANGE | CODE 1/ | PRICE | (000) | PRICE | (000) |
| DRUMSTICKS, TOMS | | R | 42.48 | 820 | 43.68 | 1,260 |
| WINGS FULL-CUT - TOMS | | M | 32.00 | 52 | 32.00 | 52 |
| WINGS, V-TYPE, TOM | 40.00 | | 40.00 | 156 | 40.00 | 156 |
| TAILS | | M | 31.00 | 20 | 31.00 | 20 |
| MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN | 92.00-94.00 | | 92.67 | 120 | 91.94 | 716 |

| EXPORT TRADING | PRICE | L.S.T. | WTD AVG | VOLUME |
|--|--------------|----------------|----------------|---------------|
| THURSDAY, SEPTEMBER 22, 2005 | RANGE | CODE 1/ | PRICE | (000) |
| DRUMSTICKS, TOMS | 41.00-47.50 | | 42.48 | 820 |
| WINGS FULL-CUT - TOMS | | M | 32.00 | 52 |
| WINGS, V-TYPE, TOM | | | | |
| TAILS | | M | 31.00 | 20 |
| MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN | 91.00-92.00 | | 91.67 | 120 |

| EXPORT TRADING | PRICE | L.S.T. | WTD AVG | VOLUME |
|--|--------------|----------------|----------------|---------------|
| WEDNESDAY, SEPTEMBER 21, 2005 | RANGE | CODE 1/ | PRICE | (000) |
| DRUMSTICKS, TOMS | | T | 47.00 | 320 |
| WINGS FULL-CUT - TOMS | | M | 32.00 | 52 |
| WINGS, V-TYPE, TOM | | W | 44.50 | 208 |
| TAILS | | M | 31.00 | 20 |
| MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN | 92.00 | | 92.00 | 156 |

| EXPORT TRADING | PRICE | L.S.T. | WTD AVG | VOLUME |
|--|--------------|----------------|----------------|---------------|
| TUESDAY, SEPTEMBER 20, 2005 | RANGE | CODE 1/ | PRICE | (000) |
| DRUMSTICKS, TOMS | 46.00-48.00 | | 47.00 | 320 |
| WINGS FULL-CUT - TOMS | | M | 32.00 | 52 |
| WINGS, V-TYPE, TOM | | W | 44.50 | 208 |
| TAILS | | M | 31.00 | 20 |
| MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN | 91.00-95.00 | | 93.00 | 80 |

| EXPORT TRADING | PRICE | L.S.T. | WTD AVG | VOLUME |
|--|--------------|----------------|----------------|---------------|
| MONDAY, SEPTEMBER 19, 2005 | RANGE | CODE 1/ | PRICE | (000) |
| DRUMSTICKS, TOMS | 43.00 | | 43.00 | 120 |
| WINGS FULL-CUT - TOMS | 32.00 | | 32.00 | 52 |
| WINGS, V-TYPE, TOM | | W | 44.50 | 208 |
| TAILS | 31.00 | | 31.00 | 20 |
| MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN | 91.00-92.00 | | 91.33 | 240 |

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.